



PeopleSoft Enterprise Release Notes for
SCM Supplier Relationship
Management 8.9 Bundle 8

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PeopleSoft Enterprise Release Notes for SCM Supplier Relationship Management 8.9 Bundle 8

These release notes reflect application updates for PeopleSoft Enterprise Supplier Relationship Management (SRM) products since the SCM 8.9 Bundle 7. This document includes resolutions for the following Supplier Relationship Management applications:

- PeopleSoft Enterprise eProcurement.
- PeopleSoft Enterprise eSupplier Connection.
- PeopleSoft Enterprise Purchasing.
- PeopleSoft Enterprise Services Procurement.
- PeopleSoft Enterprise Strategic Sourcing.
- PeopleSoft Enterprise Supplier Contract Management.

PeopleSoft Enterprise eProcurement

This table summarizes application updates for PeopleSoft Enterprise eProcurement since the SCM 8.9 Bundle 7.

Functional Categories	Description
Catalog Search	<ul style="list-style-type: none"> • Changed the catalog search by 'model' to work properly on the eProcurement requisitions. • Changed the Verity Catalog search option to work properly for the "any" option. • Modified the Verity Thesaurus search option to not perform a Thesaurus search if the "Use Thesaurus" option is not chosen.
Direct Connect / Integration Broker	<ul style="list-style-type: none"> • Ensured that the PO dispatching staging tables would not be updated in the Dispatch process when the vendor is the merchant vendor. • Ensured that ISO country codes with two digits are used properly during punch-out.
Dispatch	Changed the Notify Vendors of Attachments process to only send email notification once to vendors with valid email address.
Email Notifications	Corrected workflow escalation to generate email notification when the "notify" timeout option is selected.
Receiving	Corrected issue causing an error when transferring from the RTV Creation Confirmation page to the Receiving page for power receivers.

Requisition Creation	<ul style="list-style-type: none"> Ensured that the vendor location is defaulted properly when a requisition is created through the Business Card. Ensured that security is working properly for Direct Connect and form items using a category, which is not linked to a tree on a requisition.
Requisition Cycle/Lifeline	Changed the approval hyperlink to appear on the Requisition Life Cycle page for ePro requisitions that has been completed or closed.
Requisition Edit	<ul style="list-style-type: none"> Ensured that the shopping cart is updated properly when adding the same item and changing the line on the Requisition Summary page. Ensured that the vendor item id is updated when the line item vendor is changed in the Requisition Default or Modify Line/Shipping/Account page. Improved item pricing when the vendor and or location are changed and there is no unit of measure (UOM) price found the standard list price is used as the price base for the unit of measure (UOM) rate conversion.
Requisition VAT	Modified the Requisition Approval page to display the VAT amount and added it to the total requisition amount.
Usability	<ul style="list-style-type: none"> Corrected the vendor lookup list of requisition items to only display eligible vendors when the "accept any vendor" flag for an item is turned off. Modified the information displayed on the Approval page by removing the redundant dollar sign (\$) on the amount preceding the total amount and the VAT amount.
Verity Search	<ul style="list-style-type: none"> Corrected Verity Search to work properly in Spanish. Modified the message that displays after express items are loaded through the CUP process. Ensured that express items with different currency code will be displayed with correct conversion rate. Eliminated error when accessing the Build Verity Index process page after express items are loaded.
Workflow	<ul style="list-style-type: none"> Corrected the header status for a requisition to change to "pending" when a requisition with an "open" status is submitted. Changed the ePro workflow to not reinitialize approvals if comments are changed after clicking "save & preview approvals". Modified the Message Catalog entry approval message for an email client that does not support html.

PeopleSoft Enterprise eSupplier Connection

This table summarizes application updates for PeopleSoft Enterprise eSupplier Connection since the SCM 8.9 Bundle 7.

Functional Categories	Descriptions
Purchase Order/Purchase Order Acknowledgement	Resolved issue with comments and attachments not being visible to suppliers for purchase orders and purchase order acknowledgements where the comments and attachments were originally carried through from a requisition.

PeopleSoft Enterprise Purchasing

This table summarizes application updates for PeopleSoft Enterprise Purchasing since the SCM 8.9 Bundle 7.

Functional Categories	Descriptions
Contracts	<ul style="list-style-type: none"> Corrected the header comments to properly display while adding a purchase order contract. Modified the Contract Release page to correctly update the merchandise and adjustment amounts when new lines are added and released. Modified the GPO contract number prompt to return correct values when it has been defined for the specified GPO id and manufacturer id. Modified the price and amount fields to round and display consistently on the Contract Release pages. Updated the online contracts to behave the same for supplier contracts and recurring vouchers. Updated the Contract Workflow Notification process to not generate a worklist multiple times for the same contract and date expiration. Modified contracts to delete all contract alert worklist entries when a user changes any of the notification fields.
PO Batch	<ul style="list-style-type: none"> Ensured that the peg status is set to "complete" in the PO Reconciliation process if either a receipt or a voucher has been created for the PO. Modified to generated change orders when there is a change in the manufacturing item id using EDX. Changed to prevent a reserved purchase order from being closed when closing other purchase orders in the PO Reconciliation workbench. Modified to not allow a purchase order or requisition to be closed until the budget is valid and the entry event is processed. Changed to enable the user to close non-qualified selected lines using the override option in the PO workbench. Ensured that the encumbrance is updated correctly when rolling a purchase order for a specific ChartField by force closing the PO line that is not rolled and then reopening it. Modified to only return disqualified purchase orders in the PO Rollover Workbench when selecting "disqualified" from the PO rollover view.
PO Online	<ul style="list-style-type: none"> Ensured that a proper validation occurs and a message will be displayed with respect to the unit of measure (uom) when changing the vendor location. Changed to allow modifications to a PO having cancelled lines with

	<p>inactive departments.</p> <ul style="list-style-type: none"> • Changed to default the unit of measure (uom) and contract base price on a purchase order after it is associated with a contract. • Changed to correctly update the requisition open quantity when a PO and requisition have different units of measure. • Modified to display the purchase order line quantity on the PO Online page. • Changed to allow the line amount to be modified on an amount-only purchase order. • Corrected to not display an error message when canceling a PO header that has at least one line status canceled. • Modified to populate the project value on the PO Distribution page from the PO defaults when the override option is used. • Modified to use and convert the standard list price to the price based with the existing unit of measure conversion rate when changing the vendor location and using the requisition defaults in override mode. • Changed the price field in the PO to accept a value in the 10.5 format. • Changed to correctly renumber all existing PO lines when a PO line is deleted. • Modified to correctly update the rollover status field to "no" when a PO is copied from a rolled PO. • Modified to update the sum of the quantity and the sum of distribution percentage when saving a PO using the speedchart "distributed by amount." • Changed to not display a "save current document" message when the user saved before clicking the view printable version on the requisition. • Ensured that the PO header VAT defaults will display the correct ship from country when the vendor has more than one effective dated address for the same address sequence number and the addresses have different countries.
Procurement Card	<ul style="list-style-type: none"> • Modified the Procurement Exceptions page to mask the procurement card number. • Ensured that budget checking will only process those procurement card transactions that are specified on the Bank Statement page. • Modified the Reconcile Statement Search page to include the posted date field and a prompt for the card number field. • Modified the procurement card - Reconcile Statement page to display the employee name and employee id when the cardholder has only one PCard card issued. • Updated the department field validation at the distribution level on the Reconcile Statement page. • Modified the procurement card - Budget Checking process to not

	<p>automatically run upon saving the Reconcile Statement page.</p> <ul style="list-style-type: none"> • Changed the Online Budget Checking process to use the scheduler server specified on the Installation Options - Commitment Control page. • Ensured the monetary amount is calculated correctly for split lines on the reconcile statement.
Purchasing Product Related	<ul style="list-style-type: none"> • Changed the Requestor Setup page to display a detailed warning message when a GL business unit (BU) is not entered and dependant ChartFields are entered. • Ensured that the Build Inventory Demand process considers the intransit days into account when rescheduling the shipping date due to the shipping business unit (bu) closure calendar. • Ensured that while updating category information, the whole branch will be removed only when it has one leaf node if a user unselects the tree names to update the changes to the item catalog. • Changed the Requisition and PO Budget Checking run control pages to only show the requisitions or purchase orders that require budget checking.
Receiving Batch	<ul style="list-style-type: none"> • Modified the Receipt Accrual process to run successfully when there are receipts with more than one GL business unit (BU). • Changed the Receive Load process to correctly create asset line entries and not cancel when a non-asset item is used. • Corrected the PO Receive Load process to properly calculate item cost. • Ensured that when process receipts runs, it creates retirement asset for an item that has been rejected on the receipt.
Receiving Online	<ul style="list-style-type: none"> • Ensured that the match rule is retained for non-PO receipts. • Changed to permit only approved change order POs be available for receiving and modifications. • Changed to ensure the sum of the receipt distribution line amounts equal the receipt line amount. • Improved the performance when searching for POs in PO Receipts. • Modified to use the same search criterion for the Review Receipt and the Update Receipt pages. • Changed to not allow a receipt to be created for a PO with the receiving required flag set to "do not receive".
Report	<ul style="list-style-type: none"> • Corrected the Receipt Delivery report to print multiple comments for purchase orders at the header, line, and schedule levels. • Modified the Planned Receipts report to not print the line multiple times, if the line has split schedules and the print schedules option is not checked.

Requisition Batch	<ul style="list-style-type: none"> Updated the Requisition Loader process to pick up the correct effective dated vendor location. Ensured that when a requisition is reopened, it will be processed if the was requisition was previously closed with a distribution status of processed.
Requisition Online	<ul style="list-style-type: none"> Ensured that duplicate requisition accounting entries are not created after canceling a PO that is tied to the requisition. Changed to correctly calculate the VAT amount on requisitions and ePro requisitions. Modified to display the correct message when a non-corporate contract is linked to a requisition with an invalid business unit. Ensured that the vendor location is defaulted properly when a requisition is created through a business card. Changed the Item Search page for a requisition to correctly return items that are in the requester's assigned catalog. Ensured that the vendor item id is updated correctly when changing the vendor at either the requisition default level in PO and on the Modify Line / Shipping / Account page in ePro. Changed to only display the warning message "account field is empty" for requisition lines that are open. Changed to not display a message when splitting distribution lines that are distributed by quantity while adjusting the percent instead of the quantity on the Requisition page.
Security	Ensured that row level security is applied to the Receipts by Location Inquiry page.
Vendor Rebates	<ul style="list-style-type: none"> Corrected to properly calculate rebates based on the rebate rules defined. Changed to not display a warning message when the user id is entered in lowercase or uppercase on the Vender Agreement Header page.
Workflow	<ul style="list-style-type: none"> Modified the contract alert process to send out an email notification in addition to worklist entry only if supplier contracts is installed. Corrected the requisition header status to be changed to "pending" when a requisition with an "open" status is submitted. Changed the ePro workflow to not reinitialize approvals if comments are changed after clicking "save & preview approvals.

PeopleSoft Enterprise Services Procurement

This table summarizes application updates for PeopleSoft Enterprise Services Procurement since the SCM 8.9 Bundle 7.

Functional Categories	Description
Define sPro - Setup	<ul style="list-style-type: none"> Replaced the return to define Service Procurement hyperlink with an html area on a number of pages to accommodate calls from the Portal Application. Modified the VMS setup to only allow suppliers with service coordinators to be chosen and to provide a warning to users that they must enter their coordinator information. This will prevent users from creating work orders or requisitions with invalid VMS business unit and supplier information.
Time/Expense	Changed to allow a submitted timesheet that is adjusted to remain in submitted status until it is approved. Note: Adjusting the timesheet after approval will change the status to "adjusted".
Usability	Ensured that the project id, role and action description fields are enabled for multiple languages on the Bid History page.
Work Order	<ul style="list-style-type: none"> Modified the work order distribution grid to make the department field available for entry and to retain all department values after the work order (WO) is saved. Modified the work order distribution information available to help a user determine which accounting distribution line to allocate actual time against. Modified a lookup available to the provider during time entry and to the time approver during adjustments.
Workflow	<ul style="list-style-type: none"> Corrected requisitions to change the header status to "pending" when an "open" requisition is submitted. Changed the ePro workflow to not reinitialized approvals if comments are changed after clicking "save & preview approvals". Changed to display the sum of hours (regular plus any overtime) in the email notifications for timesheet submittal and timesheet adjustment.

PeopleSoft Enterprise Strategic Sourcing

This table summarizes application updates for PeopleSoft Enterprise Strategic Sourcing since the SCM 8.9 Bundle 7.

Functional Categories	Description
Award Analysis	<ul style="list-style-type: none"> Modified to allow users to save RFI events in Analyze mode without getting the matching buffer row error. Modified to hide the total bid cost and total header cost fields on the Analyze Total page. Modified so the display options drop down box no longer includes the view factor costs option.
Bid Factor Setup	Replaced the 'return to the services procurement' hyperlink on the Bid Factor pages with an HTML area in order to preserve the portal navigation when the portal database is installed with the FSCM database.
Bid Response	Modified to allow suppliers to bid more than once on multi-round events.
Bidder Registration	Replaced all occurrences of COMPANY_ID(20) within Sourcing to AUC_COMPANY_NAME(40) to allow importing of external bidders so their company name matches the vendor name length.
Contracts Integration	<ul style="list-style-type: none"> Modified so the bid factors are now being passed over to the contract if they do not have an associated agreement or clauses assigned to them. Modified to allow email address to default when selecting internal user for the contract workflow agreement.
Event Creation	Prevented the Preceding Lot and Next Lot links from being displayed for RFI events when returning to the Event Summary page after copying from a RFI.
Functionality	<ul style="list-style-type: none"> Modified the query SQL to handle apostrophes in search criteria. Updated the price charts to display the event currency code instead of a dollar sign (\$).
Notifications	Modified the email template to pass correct line information when notification are sent.
XML	<ul style="list-style-type: none"> Modified the XML code to convert all weighting values to numbers from string values to allow regional settings to take effect. Limited the length of the worksheet name to prevent translated sheet names from being longer than the allowed length.

PeopleSoft Enterprise Supplier Contract Management

This table summarizes application updates for PeopleSoft Enterprise Supplier Contract Management since the SCM 8.9 Bundle 7.

Functional Categories	Description
Contract Entry/Notifications	<ul style="list-style-type: none"> Resolved issue where the Contract Alert Workflow process for expiration and maximum amounts does not generate an email to the buyer. Corrected an Oracle platforms issue where the agreement workflow email address was not being defaulted. Resolved issue with header and line attachments where the error message "incorrect field is required" was given only when attachments were added without including a comment with the attachment. Corrected issue when trying to add a pre-defined agreement to a contract having a default target date type of 'contract end-date' at the contract line SLA level. Modified the prompt for the clause id on the Setup Agreements page to always show the complete list of clauses based on the approval/effective status combinations.
Contract Library	<ul style="list-style-type: none"> Resolved a version 7 DB2 OS390 platform issue where a error was issued when attempting to expand a Document Configurator. Modified the Rules page to correctly show the system maintained SLA placeholder sections as objects that can add into the content grid. .
Document Management	<ul style="list-style-type: none"> Resolved issue related to final collaboration notification for users submitting a document to collaboration on behalf of the document administrator. This fix enables both the document administrator and the user submitting the collaboration on behalf of the administrator to be notified by email and or worklist. Modified contract generation to prevent a dependent pending clause from excluding other sibling approved clauses at the same level when the document is created. Corrected the setting of document status when a user other than the document administrator assigned to the document cancels the collaboration loop. If nothing has been done to the document, the document status should be set back to 'draft'. If the document has been modified, it should set the status to 'collaborated pending review'. Resolved issue with the Document Management allowing any user to be selected as the Document Administrator by adding an edit check to ensure that the user selected has the correct authority set up in user preferences as administrator and to prevent the user from getting locked out of the document. Corrected an error from occurring for a generated document when special characters such as '&' are embedded within bind variables and were used

	within the content of a clause or section in the configurator.
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